



Work Plan Template Description

The Project Work Plan sets out the major work processes and constituent units of work that will be used to accomplish the project. The major work processes, along with the cost accounts, provide the basis for determining the work plans, which are the detailed plans against which progress and performance will be measured. The work plan is developed iteratively, along with the following other deliverables:

- (1) Project Schedule and Milestones, which includes target start and stop dates (at the work plan level, these are typically estimated by major work elements); and
- (2) Project Resource Plan, which includes estimated resource requirements to complete the work (normally expressed in work-days).

The estimates are made separately by skill type and organization unit (or organizational breakdown structure (OBS) element). The work plan may be called an approved work plan following approval by the sponsor, or a staffed work plan once the staffing is determined and individual work assignments are made and recorded.

The work plan is drafted during the Organize IPT phase, working from the target delivery date, interim milestones, initial work-day estimate, and definition of scope. It is maintained throughout the life of the project through replanning activities and is consolidated into the Master IPT Schedule.

Work Package

This is the first-order breakdown of the work as it facilitates (1) deriving the work plan totals, and (2) attaching the relevant portions of the work plan to the corresponding work plans.

Type/Skill

Program management typically provides standard categories to be used here. The preliminary and initial work plans use type/skill placeholders (such as Senior Function Analyst 2, Architecture Expert 1, etc.); these placeholders are replaced by team member names when the staffing is determined.

OBS Element

The entity (business representative or third-party) and organizational unit (such as department section) that are expected to provide the resource.

Rate/Unit Cost

Provided by program management for each type/skill and OBS element combination.

Other Resources

Program management may specify that certain critical resources be planned and managed on the basis of units needed/used per period. If so, such resources are shown here.



Work Plan Template

Preliminary

Approved

Staffed

Revised

Program Name: _____ Program Manager: _____

Project/Function Number: _____ Project/Function Name: _____

Project/Function Manager: _____

Project Scope and Approach:

Deliverables, Acceptance Criteria, and Specifications:

The acceptance criteria and specifications are attachments.

Summary Effort (Cost) and Schedule Baselines and Priorities:

Overall total budgeted work-days, and project start and complete dates. This figure also includes the total budgeted cost if project managers are held responsible for cost as well as resource usage. The data regarding priorities addresses the key factors that influence the tradeoffs made across the baselines, as reflected in the project plans. For example, the schedule requirement may be the top priority, leading to a concurrent engineering approach and marginally higher effort. Note that these priorities will influence the replanning activities as well.

Summary Resource Requirements:

Overall planned resource requirements, including any critical non-human resources needed.

Estimating Assumptions:

Scheduling Assumptions:

Comments: